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On the Go:
Mapping Mobile Capabilities to Your Organization's Needs

SPEAKERS
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DATE
December 14, 2017

COMPETENCIES
Tools

MATURITY PHASES
CMM1, CMM2, CMM3, CMM4

HIGHLIGHTS

Thomas shared his mobile expertise with members.

- Confused about mobile applications and responsive site offerings? Thomas goes through the advantages and disadvantages of each.

- Interested in what drives mobile capability? Thomas explained the 2 main areas.

- Want to understand the community and organization wish lists for mobile? Thomas broke community down by internal and external wish lists and also gave the top 6 wishes for organizations.

OVERVIEW

Background Thomas Vander Wal: Thomas has worked with many of the different platforms as an Advisor, sometimes helping with features. He has also helped many companies with rollouts, assessments, next stage development and releases. He has been working with mobile since 2000.

Understanding Mobile: In order to understand mobile, the first step is to know whether or not it means full access to everything on the web space. Usually, it is a subset of the web version unless there was mobile access right from the very beginning. In other words, it is often not the full capability of what's available on a desktop.

OVERVIEW, CONT.

Understanding What Drives Mobile Capability: There are 2 areas that drive mobility:

- *The Social Platform:* This is usually focused on what the social platform offers. Not all modules and customizations will flow over to the mobile experience. They can either be customized or simply unavailable.
    - Platform capabilities are either a responsive site or a mobile application.
    - Most companies choose one or the other based on their business needs and financial budget.

- *The Organization Side:* This can be broken down further into 2 other elements:
    - *Mobile Device Management Service:* This is essentially sandboxed mobile applications. The enterprise has a secure log-in for mobile applications. It also provides single-sign on and pre-approved access to apps based on roles and groups and ease of configuring apps to work together. So, if you've got SharePoint and files in SharePoint with permissions, you can connect that to the mobile community application.
    - *Enterprise Mobility Management Service:* This is the large umbrella that sits overtop.

Common Community Wishes – Internal: Individuals usually want to be able to get what they see on their desktop on their mobile devices, as well. In particular, they want to be able to set alerts for those areas that require their immediate attention.

- Calendar integration is also high on the list, as well as messaging; ability to respond from anywhere; team access for internal; access to Q&As; ease of finding resources; adding content from internal communities, i.e. adding photos, notes, audio, video, documents; presence notifications that show when someone is online and location awareness to know if a colleague is in his/her region.

Common Community Wishes – External: Alerts, contact and calendar integration are also important externally.

- The ability to support tracking; bookmarks; My Resources; ease of finding resources; ease of adding photos, notes and videos; presence notification; being able to ask questions; ease of communicating in other options (not always granted due to privacy concerns).

Common Organization Wishes

Top on the list are security and compliance.
- Permissioning, particularly for compliance and security and confidentiality within a community space; ability to set governance; productivity; hand-in-hand are ease of access to resources, ease of asking questions and ease of answering questions; ability to connect to other needed mobile resources; ability to have Cloud services for mobile in order to bridge beyond the organization's walls to share files with clients, etc.

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BEST PRACTICES

Understand the Advantages and Disadvantages of Mobile Offerings

The two types of offerings for mobile are mobile applications (the applications for mobile devices, usually optimized for the device) and responsive (mobile capable web version).

- *Mobile Applications:* These are the applications for mobile devices, usually optimized for the device.
  - *Advantages:* Good for internal or committed external communities; services are usually quicker; data use on mobile is lower; usually a good security model; can connect more easily to mobile device resources, such as alerts, calendars, etc.
  - *Disadvantages:* Requires downloading and updating of the application; updating design and layout takes more time; widgets on the full-service site are less likely to be available on mobile; adds a level of friction for external users who want to jump in quickly.

- *Responsive Site Offerings:* This is essentially the website version resized for mobile.
  - *Advantages:* Usually good for external users because they can use the same URL; only a little modification is needed from those who maintain it; it's usually readily available; changes to the design can be made in one place and reflected everywhere immediately; you don't need to download the app or do updates and it's easier to customize.
  - *Disadvantages:* Can be heavy with data use unless it's optimized well; consequently, tends to be slow; lack of access to device resources; can be an issue with security; lack of access to device resources.

Understand Mobile Needs

This refers to triage and prioritization.
- A mixing of community member needs and community management needs and then setting a prioritization list (top tier needs, etc.) to see where the needs overlap.
- Then being able to work with the organization's IT Department to meet the needs. Figuring out those pieces and getting updates and upgrades can be an issue.
- Next is the ability to work with vendors and foster a strong relationship with them to help with further development. For example, modules, plug-ins, etc. that can be used to enhance the functionality.
- Last is the rollout, followed by testing and continual reiteration.

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LESSONS LEARNED

➢ Hillary was surprised about the data usage on the apps vs. responsive design. Thomas explained that the website-based services are very heavy. Each page can be 1 mg to 5 mg, which is incredibly hefty if you're on restrictive data services. The mobile side for that is usually in the 10K to 40K range for each page.

➢ Hillary asked about the slowness disadvantage on the responsive site. She wondered if it was across all devices or both the responsive side and mobile device. Thomas replied that they are slow on both, but it is exaggerated even more with the mobile device because the data access speeds are usually thinner.

   • Additionally, many of the images on mobile are of a higher resolution than desktop due to the improvement of mobile screens in the last 4 or 5 years. As a result, it requires a higher quality and a larger file size to look good on mobile devices. That slows things down.
   • Another thing to keep in mind is that complex features like tables work well on desktops, but not for the mobile experience.
   • One suggestion was to have 2 different navigations. Top navigation is dealt with one way and long navigation a different way.

➢ Thomas stressed that the use case for mobile is slightly different than desktop. Mobile is usually used in an in-the-moment way, i.e. to capture now and clean it up once you get back to your desk. Therefore, help members of the community understand that it is ok if it doesn't look perfect on mobile. To help people understand that it is a work in progress, flag it as a draft in progress.

➢ Participants discussed whether to use third party resources to help with mobile design:
   • One participant stated that they used to do it in-house, but the company decided to let-go of their internal IT staff and outsource the function to IBM.
   • Thomas shared that having SharePoint chat embedded within SharePoint usually works well. Salesforce also has a good API. You can have an API for SharePoint that just uses SharePoint chat capability, but has an API that reads back and forth to Salesforce. So, you are living within the one space, but you're communicating between platforms and it looks native in both platforms. It's a matter of figuring out which service is going to have which capability. It can get difficult with mobile because people usually opt for using an app because it's quicker.
      • Many apps offer the ability to set personal preferences and favorites.

LESSONS LEARNED, CONT.

➢ Hillary asked for exercises and/or suggestions to help understand member needs to make prioritization easier:
- It's easier to get feedback from an internal community. You can do usability testing to ensure proper functionality.
- One member works with a Jive community. They haven't had to do much usability testing because the app is the app and there isn't much that they can do to change it. However, it was rolled out within their company and they continually promote and communicate it. They let people know that they can participate from the mobile app, as well as the desktop. It is a subset of the overall functionality, but they do submit their suggestions for improvement to Jive.

➢ Jive Daily has about 80% of the website functionality. However, the above participant would like to use their Ideas feature, but it isn't functional on the mobile app. For those who work in the field and who get an idea, they can't submit it right at that moment, which is ironic. You can work around it – like emailing the content – but that defeats the purpose. That said, all in all it's a good app.

➢ Hillary asked Thomas to share which mobile platforms he believes do the job well:
- Thomas really likes what they did with Salesforce 1. Pretty much everyone that Thomas talks to says that they prefer Salesforce 1 to anything else. Ideas that came about from Salesforce 1 are making their way into desktop and leading the interactions.
- Thomas has been playing around with Mighty. It started out as Mightybell and now it's Mighty Networks (MN). They have a good mobile app. It's relatively thin in terms of capabilities, but it is really quick. Thomas feels it would work well in a small, external community. The app gets out of your way and lets you do what you want to do. But it's also mostly used in communities that are somewhat thin and somewhat more lightweight than heavy support communities or internal needs.
  - As far as mobile apps that are quick and easy to use, check it out. If nothing else, you can get some good ideas from it. Then sit down with your vendor and discuss the ideas.